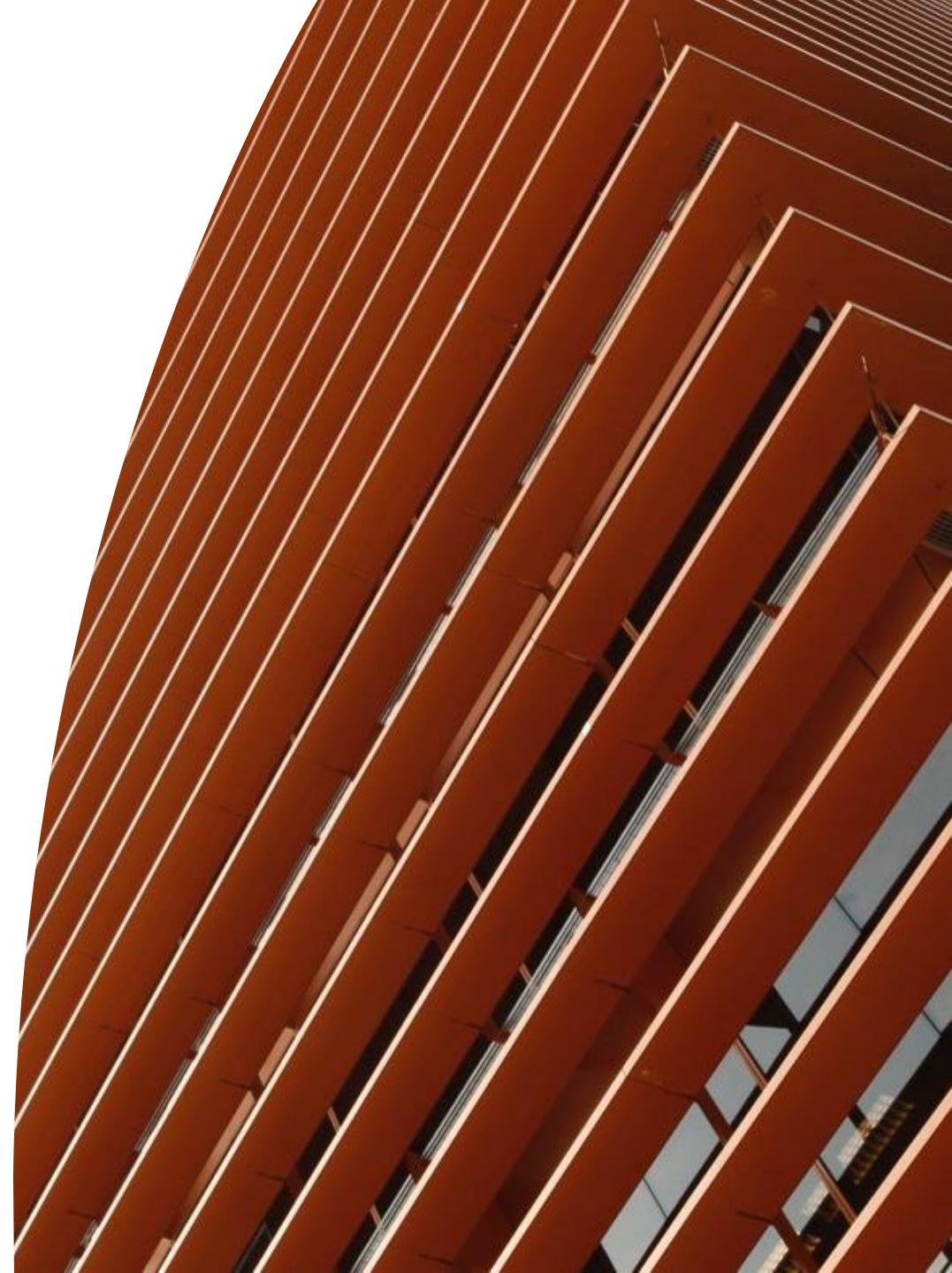


State of play: EU Digital Decade Policy monitoring and relevance for EaP countries

EaPeReg Plenary, 12 November 2025



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Part 1: Digital Decade monitoring exercise



Part 2: Article 22 EECC and BEREC Guidelines

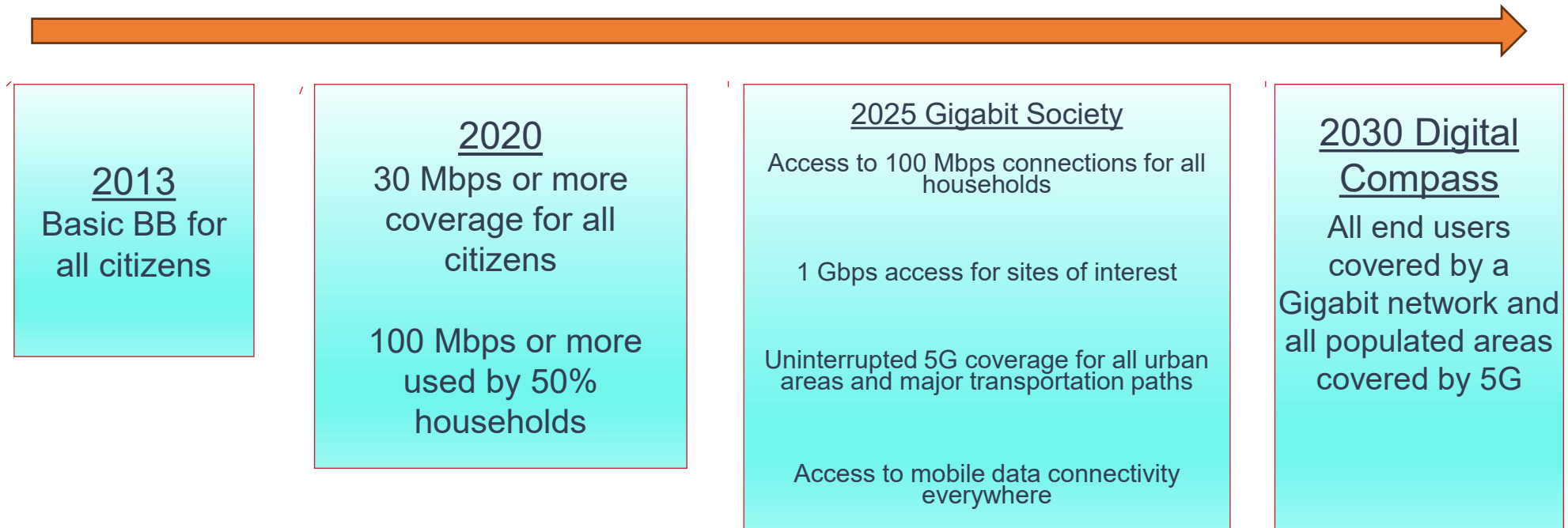
Part 1: Digital Decade monitoring exercise

Unlocking broadband investments in Europe- the role of goals and metrics

In Europe, the EC has envisaged successive ambitious policy goals for broadband connectivity.

Assessing their achievement requires continuous and harmonized measurement.

Policy-decisions are taken based on the measurements and reporting.



DECISION (EU) 2022/2481, Digital Decade Policy Programme 2030. (To be reviewed by June 2026)

Sets digital targets.

“All end users at a fixed location are covered by a gigabit network up to the network termination point, and all populated areas are covered by next-generation wireless high-speed networks with performance at least equivalent to that of 5G, in accordance with the principle of technological neutrality;”

Establishes formally the role of **Digital Economy and Society Index-**

“The Commission shall monitor the progress of the Union towards the general objectives and the digital targets. To that end, the Commission shall rely upon DESI and shall set out, by means of an implementing act, the KPIs for each digital target”.

Establishes a **yearly report on the Digital Decade**, assessing **progression** [1]

Requests the **submission of national roadmaps** [2]

Establishes the realization of union level and national trajectories [3]

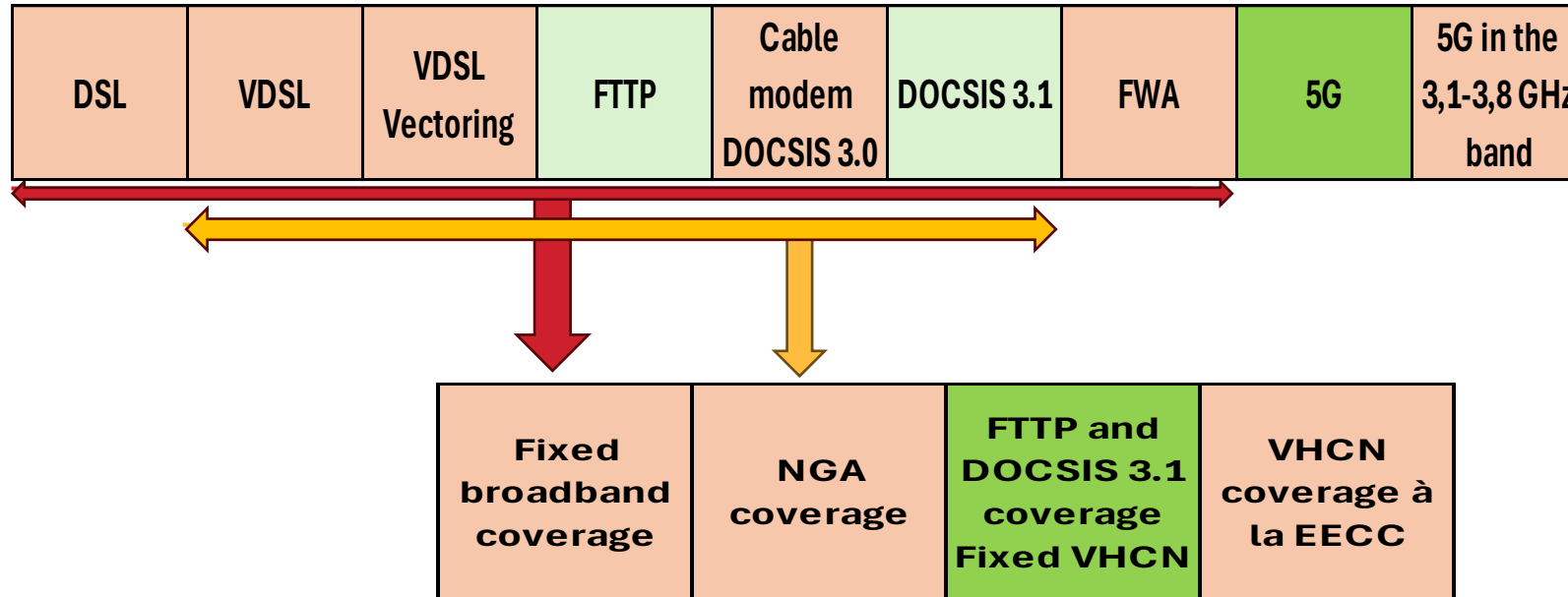
Implementing decision setting out key performance indicators to measure the progress towards the digital targets (June 2023)

*“(3) Gigabit connectivity, measured as the **percentage of households covered by fixed Very High-Capacity Networks (VHCN)**. The technologies considered are those currently able to deliver gigabit connectivity, namely Fibre to the Premises and Cable DOCSIS 3.1. The evolution of the Fibre to the Premises coverage will also be monitored separately and taken into consideration when interpreting VHCN coverage data.*

*(4) 5G coverage, measured as the **percentage of populated areas covered by at least one 5G network regardless of the spectrum band used.**”*

“Broadband coverage in Europe studies”¹.

Coverage %. Household numbers, rural and non-rural at NUTS3 and national level



Speed. Proportion of households reaching peak-time speed by tiers at country level

At EU level “Broadband Coverage in Europe” studies’ results are used to:

- Inform and guide the allocation of funding for broadband infrastructure
- Inform regulatory reform (EC, BEREC and others).

White Paper, How to master Europe’s digital infrastructure needs? (COM (2024) 81 final)

“The connectivity infrastructure of the Union is not yet ready to address the current and future challenges of the data-driven society and economy and the future needs of all end-users”

“As regards 5G roll-out, while basic 5g population Coverage in the EU currently stands at 81% (...), this metric does not reflect the delivery of actual advances 5G performance”.

BEREC’s input to the EC Call for Evidence on the Digital Networks Act BoR (25) 01

“Therefore, overall Europe enjoys good performance:

-Fixed VHCN Coverage grew from 50% to 82.5% (DESI 2024-2025 reports) (...)

-When it comes to 5G, 94.3% of the EU population was covered by at least one 5G network in 2024, comparable to the 97% in the US and the 95% in China (DESI 2025 report)”

Part 2: Article 22 EECC and BEREC Guidelines

Article 22 EECC (1, 5, 6 &7)

Obliges MS to conduct a geographical survey (GS) of the reach of ECNs capable of delivering broadband.

At appropriate level of local detail, including QoS information and it may include a forecast of the reach of broadband networks, including VHCNs.

At national level the GS is a **key information tool**:

- to deliver national broadband plans & allocate public funds for deployments
- to prepare state aid submissions
- in other activities (USO availability, coverage obligations related to spectrum availability)

MS shall ensure that authorities “take into account results” and provides for the data sharing between public authorities

Obliges the publication of GS results to inform end-users about connectivity if no other means exist.

BEREC to issue guidelines on the consistent application of GS and forecasts.

BEREC Article 22 Guidelines

Between 2020 and 2021 BEREC delivered the **Guidelines to assist NRAs and OCAs on the consistent implementation of their obligations under Article 22 of the EECC:**

- Guidelines to assist NRAs on the consistent application of geographical surveys of network deployments (BoR (20) 42).
- Guidelines on geographical surveys of network deployments- Verification of information, (BoR (21) 82).
- Guidelines on geographical surveys of network deployments Article 22 (2), 22 (3) and 22 (4), (BoR (21) 32)



bb
mapping



How to
verify the
bb map

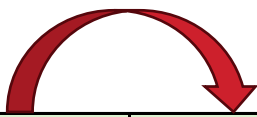


Designated
areas

BoR (20) 42 define “reach” and establish a “common” GS of “reach”

- identified the metrics: QoS-1 information. Coverage per technology, speed definitions (peak-time and maximum achievable speed), VHCN indicators
- provided common definitions of core concepts such as ‘premises passed’ or “grid passed”
- promoted yearly data collection at address/small grid information

Art 22 and BEREC GL



Number of MS that:		2019	2024
Fixed broadband	Implement bb map	21	27
	with granular info	16	26
Mobile broadband	Implement bb map	18	26
	with granular info	12	26

Premises passed & grid covered- key concepts in coverage

Premises passed (fixed broadband).

A premise passed if broadband service can be provided in less than 4 weeks, and at no additional cost for end-user (reference: normal connection fee).

In 2024, definition used in 25 MS.

Grid covered (mobile broadband).

A grid is covered if a broadband service is available in at least 95% of the grid area with a probability of successful service reception of 95%.

In 2024, definition used in 16 MS.

Art 22 GS & relation to Europe Broadband Coverage studies/DESI

In 2021¹, almost 40% of the public authorities providing information used “large area” information to calculate the DESI fixed broadband coverages. For mobile broadband, around 25%.

With large areas, one must use assumptions to “treat” overlaps (i.e several operators with deployments in the same area/grid). This can result in non comparable metrics.

In 2024²,

BEREC saw progress:

- more NRAs/OCAs were providing the information to the EC Consultant

- many used the Art. 22 GS as a basis. Therefore, no need for aggregation assumptions



better quality and more comparability of national results.

Yet, BEREC saw no progress in updating the definitions of “homes/households passed” and in finding a common ground for “rural”



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